



Expand Financial, LLC.

ERM: Expand Revenue Manager™

Scalable | Comprehensive | Easy to Use

Simplify your revenue collection, allocation, and invoice processing with ERM.

ERM was designed from the start to meet the needs of the most complex financial services organizations, while remaining cost effective to the small to mid-sized firms wishing to automate their revenue management operations. ERM has helped our clients significantly reduce their cost and improve their accuracy of their revenue processing.

System Benefits

- Complete oversight of billing operations
- Automated, Exception-based processing
- Increased accuracy
- Improved cash flow
- Reduced processing/payment cycle
- Audit and compliance fulfillment
- Rules based workflow and exception processing
- Automatically calculates accruals and reversals
- Flexibility in Reports
- Ensure Accurate Common Remitter Payments

System Features

- ✓ Tracks and calculates complex fee computations across all fee types
- ✓ Handles bi-directional revenue management across multiple entities
- ✓ Automates revenue management, accounts receivable/payable, and invoicing
- ✓ Provides reporting at Firm, Business Unit, Partner, and Wholesaler level
- ✓ Intuitive, easy to use browser interface
- ✓ Average Daily Balance Reporting versus snapshot reporting



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